STATE OF NORTH DAKOTA

Requisition
Training Scripts

REQUISITION TRAINING MANUAL – EXERCISES

This system allows requisitions to be used internally and externally:

- Internally (within an agency)
  - Allows those agencies using paper requisitions within their agency to move to electronic.
- Externally
  - Allows routing of requisitions to external sources, such as
    - State Procurement
    - Information Technology
    - Facility Management

When creating the transactions in these exercises, please use the values provided in the exercise. The course instructor will review the answers to the exercises in class.

Requisitions – Scenario 1

Create Simple Requisition on Behalf of Another Requester

Steps	Directions	Comments
Step 1	**Navigation:** *Purchasing → Requisitions → Maintain Requisitions*	
Step 2	On the **Add a New Value** tab, enter **Business Unit (BU)** or verify correct BU defaults.	Click to search BU (if needed).
Step 3	Click Add.	
Step 4	Enter a requester. *Requester:	Click to search Requesters (if needed).
Step 5	Click Header Defaults hyperlink.	
Step 6	For a specified vendor enter the vendor ID in the **Vendor** field. Enter appropriate default information such as **Buyer**, **Ship To**, **Due Date**, **Category (listed in comments)**, **UOM**, and **Distributions (listed in comments)**.	Click to search Vendors (if needed). If **UOM**, **Category** and **Ship To** are left blank, values will default from Default page. They are required fields. **Category –** 91575 **Distributions:** Account – 602005 Oper Unit – 110 Fund Code – 001 DeptID – 1000 Class – 11030 Locations - 110000
Step 7	Click OK to return to the **Form Page.**	
Step 8	Enter **Variable Data**	**UOM** and **Category** will default from

	Enter **Description**. Enter **Req Qty**. Enter **Price**. Click **Refresh**.	**Item ID** or from Defaults page. Verify and correct as needed. **Ship To** will default from Defaults page. Verify and correct as necessary.
Step 9	Click the **Schedule** tab.	
Step 10	Verify default information such as **Ship To, Due Date, Req Qty** and **Price.**	
Step 11	Click the Distribution hyperlink	
Step 12	Enter required values that did not default. Enter **Account** Enter **Fund** Enter **Class Funding** Enter **Dept**	Verify defaulted values.
Step 13	Click OK.	Returns to **Schedule** tab
Step 14	Click Forms Tab and Save.	
Step 15	Budget Check Requisition by clicking .	**Note:** The Budget Status will change from Not Checked (**Budget Status:** Not Chk'd) to **Valid** (**Budget Status:** Valid). Also, note that the Budget Check icon is now grayed out. This is your indication that the Purchase Order has been budget checked.
Step 16	Click Save.	Req ID: ______________________
Step 17	**Approve Requisition** **Navigation:** *Purchasing → Requisitions → Approve Amounts.*	
Step 18	Enter **Business Unit** and **Requisition number** in the Search Dialog page.	Note: If your requisition automatically displays, go to step 21. If your requisition does not display, follow steps 18 – 21.
Step 19	Click Search.	
Step 20	The search results will display, find your requisition, click it. **Search Results** View All First 1-2 of 2 Last **Business Unit** | **Requisition ID** 11000 | 0000000048 11000 | 0000000036	
Step 21	Verify that the information is correct. Click Save.	(Note the Status will change from "Initial" to "Complete".)

Requisitions – Scenario 2		
Create Requisition with Multiple Lines		
Steps	**Directions**	**Comments**
Step 1	**Navigation:** *Purchasing → Requisitions → Maintain Requisitions*	
Step 2	Under **Add a New Value** Tab, enter **Business Unit (BU)** or verify correct BU defaults. Click Add.	Click to search BU (if needed).
Step 3	Enter a requester. *Requester:	Click to search Requesters (if needed).
Step 4	Under **Form** Tab, click Header Defaults hyperlink.	
Step 5	On **Header Defaults Page**, verify that the "Overide" button is selected.	**Override** allows changes in the distributions. If you choose **default** the requisition is locked and you will not be able to change the distributions.
Step 6	Under **Items Defaults** section, enter the following: **Buyer** **Ship To** **Due Date** **Category** **UOM**	For each field, click on to select appropriate selection.
Step 7	Under **Distribution** section, enter the following: **Account** – 602005 **Oper Unit** - 110 **Fund Type** – 001 **DeptID** – 1000 **Class** – 11030 Click OK to return to the Form page.	For each field, click on to select appropriate selection.
Step 8	On **Form Page**, enter correct **Origin field.**	The **origin** field is the origin of the requisition. It will be used for the routing of the approval. It will be the divisions within an agency.
Step 9	Click on **Header Comments** hyperlink. Click OK to return to the Form	Click on to select appropriate selection.

	page.	
Step 10	Under **Line Section**, enter the following: **Description** **Req Qty** Click on the Refresh button on bottom of the page, this will bring in the defaults for the UOM, category and ship to.	UOM, Category and Ship To should default from Header Defaults page.
Step 11	Click the **Schedule Tab.**	
Step 12	On the **Schedule Page**, verify **Ship To** and **Due Date**. Enter the unit price in the price field.	
Step 13	Click the Distribution hyperlink	
Step 14	On the **Distribution Information** page, verify defaulted values. Enter required values that did not default from step 6 above. The required fields are: **Account** – 602005 **Operating Unit** – 110 **Fund** – 001 **DeptID** – 1000 **Class** – 11030	
Step 15	Click OK, to return to **Schedule** page.	
Step 16	Click **Forms Tab** and Save**.**	
Step 17	**Note Req Number** ________________	
Step 18	Click on the **yellow plus sign** to add additional row(s).	
Step 19	A screen labeled “Explorer user Prompt” will appear in the upper left corner. Enter the number 4 and click on OK.	
Step 20	Under **Line Section**, complete the following for the additional four line items: **Description** **Req Qty** **Price**	Click on to select appropriate selection.
Step 21	Click on the **Refresh** button on bottom of	UOM, Category and Ship To should

	the page. This will bring in the defaults for the UOM, category and ship to.	default from Header Defaults page.
Step 22	Click the **Schedule** Tab.	
Step 23	On the blue "line" bar, click on "View all". Verify **Ship To** and **Due Date** on each item. Click Save.	
Step 24	Return to the **Form** tab by clicking on Form tab.	
Step 25	Click to run Budget Checking. After Budget Checking is complete, click Save.	**Note:** The Budget Status will change from Not Checked (Budget Status: Not Chk'd) to **Valid** (Budget Status: Valid). Also, note that the Budget Check icon is now grayed out. This is your indication that the Purchase Order has been budget checked.
Step 26	**To approve requisition use the following navigation:** *Purchasing → Requisitions → Approve Amounts*	
Step 27	Enter **Business Unit** and **Requisition number** in the Search Dialog page. Click Search.	Note: Your requisition will automatically display since you just entered it. If it does not display, follow steps 27 - 28.
Step 28	Click Save to approve the requisition.	

Requisitions – Scenario 3		
Create Requisition by Copying From Another Requisition		
Steps	**Directions**	**Comments**
Step 1	**Navigation:** *Purchasing → Requisitions → Maintain Requisitions*	
Step 2	On the **Add a New Value** tab, enter **Business Unit (BU)** or verify correct BU defaults. Click Add.	Click to search BU (if needed).
Step 3	Enter a requester other than yourself. *Requester:	Click to search Requesters (if needed).
Step 4	Select the Copy From hyperlink. Enter **Requisition ID.**	Click to search for Requisition (if needed).
Step 5	Click OK.	
Step 6	Enter **Variable Data** Enter **Origin.** Verify the copied **Line Information**. Make corrections as needed.	
Step 7	Click the **Schedule** tab.	
Step 8	Verify default information such as **Ship To, Due Date, Req Qty** and **Price.**	
Step 9	Click the Distribution hyperlink	
Step 10	**Distribution Page** Verify the copied **Distribution Values**. Make corrections as needed.	
Step 11	Click OK.	Returns to **Schedule** tab
Step 12	Click **Forms Tab** and Save	
Step 13	Budget Check Requisition by clicking	**Note:** The Budget Status will change from Not Checked (**Budget Status:** Not Chk'd) to **Valid** (**Budget Status:** Valid). Also, note that the Budget Check icon is now grayed out. This is your indication that the Purchase Order has been budget checked.
Step 14	Click Save.	

Step 15	**Approve Requisition** **Navigation**: *Purchasing → Requisitions → Approve Amounts*	
Step 16	Enter **Business Unit** and **Requisition number** in the Search Dialog page.	Note: Your requisition should automatically display since you just entered it. If not, follow steps 16-18.
Step 17	Click Search.	
Step 18	Click Save.	(Note the Status change from "Initial" to "Complete".)